

DOZUKI

How to Create Event Visit

Written By: iRobot

Step 1 — How to Create Event Visit

Search for **weerapol** (starts with)

My Recent Items

- Weerapol Wattanisorn
- Weerapol Wattanisorn
- Weerapol Wattanisorn - RVB-1512
- Weerapol Wattanisorn

Search for **weerapol**

Go! Edit | Create New View

Recent Opportunities

Opportunity Name	Account Name	Project	Marketing C
Varunee Kerdvongbundit	Kerdvongbundit, Varunee	185 Rajadamri	OPC - Event
Vannakorn Soonthon Brant	Soonthon Brant, Vannakorn	The River	Media - Builc
Phannarong Wetchavanwong	Wetchavanwong, Phannarong	The River	Owner Refer
Gilles Hervé	Lu, Gilles Hervé	Northpoint	Owner Refer
Phannarong Wetchavanwong	Wetchavanwong, Phannarong	UNIXX South Pattaya	Unknown
Phannarong Wetchavanwong	Wetchavanwong, Phannarong	UNIXX BKK	Unknown
Phannarong Wetchavanwong	Wetchavanwong, Phannarong	The River	Unknown
Phannarong Wetchavanwong	Wetchavanwong, Phannarong	Northpoint PRC	OPC - Booth
Vithule Tansinkonkol	Tansinkonkol, Vithule	Zire Wongamat	OPC - Event
Phannarong Wetchavanwong	Wetchavanwong, Phannarong	Zire Wongamat	Unknown
Chabbert Briette Noelle Myriam	Myriam, Chabbert Briette Noelle	The River	OPC - Event
Jacobus Cornelis Van Treijen	Van Treijen, Jacobus Cornelis	The River	Existing Buy
Poonam Luthra	Luthra, Poonam	The River	Media - Builc
Kim Sing Ng	Ng, Kim Sing	The River	Agent Bangk
Waraporn Puranasamriddhi	Puranasamriddhi, Waraporn	The River	OPC - Booth

- Input Account (client) name or email in search box then click search button.

Step 2

Opportunities

New Opportunity

Action	Opportunity Name	Project	Lead Source	Stage	Opportunity Owner Alias	Marketing Campaign
[Edit] [Del]	Weerapol Wattanisorn	The River	Media	Not Contacted	pweic	Unknown
[Edit] [Del]	Weerapol Wattanisorn	185 Rajadamri	Online	Contacted	crml	Event - Raimon Land Annual
[Edit] [Del]	Weerapol Wattanisorn	UNIXX South Pattaya	Owner	Not Contacted	hcrn	Owner Event
[Edit] [Del]	Weerapol Wattanisorn	Zire Wongamat	Online	Closed Lost (Sales)	ndm	Online - Web-RML Google A
[Edit] [Del]	Weerapol Wattanisorn	UNIXX South Pattaya	Owner	Not Contacted	hcrn	Owner Event
[Edit] [Del]	Weerapol Wattanisorn	UNIXX South Pattaya	Media	Not Contacted	WWatt	Media TV Soap Opera CH.3-Events
[Edit] [Del]	Weerapol Wattanisorn	Zire Wongamat	Media	Not Contacted	crml	Owner Unknown
[Edit] [Del]	Weerapol Wattanisorn	Northpoint	Media	Closed Lost (Marketing)	ndm	Media - Billboard-BTS Taksin
[Edit] [Del]	Weerapol Wattanisorn	Zire Wongamat	Media	Closed Lost (Marketing)	ndm	Media - Billboard-Pattaya Str
[Edit] [Del]	Weerapol Wattanisorn	The River	Online	Closed Lost (Sales)	ndm	Agent Bangkok
[Edit] [Del]	Weerapol Wattanisorn	Northpoint	Agent	Closed Lost (Sales)	ndm	Unknown

- Choose Oppotunity name

Step 3

The screenshot shows the CRM interface with the 'Open Activities' section highlighted. A callout box points to the 'Open Activities' link in the left sidebar with the text 'Mouse over here'. Another callout box points to the 'New Task' button with the text 'Click here!'.

- Move mouse over link Open Activities, then click New Task or scroll mouse down to block Open Activities.

Step 4

The three screenshots show the 'New Event' form. The first screenshot shows the 'Calendar Details' section with callouts 1 through 6. The second screenshot shows a dropdown menu for 'Subject' with the text 'Click here!' and a list of options. The third screenshot shows the 'Calendar Details' section with the 'Subject' dropdown menu open.

- Input detail below list:
 - 1. Assigned to: Choose Sales Executive on site that client will visit appointment
 - 2. Subject : Choose Visit
 - 3. Visit Status
 - 4. Related Project
 - 5. Location
 - 6. Description

Step 5

Description Information

Description

Recurrence

☐ Create Recurring Series of Events

Reminder

Reminder ☒ 15 minutes 7

Click here!

Save Save & New Task Save & New Event Check Spelling Cancel

Attachments

Attach File

No records to display

Always show me fewer ▲ / ▼ more records per related list

Invite Others:

Add Invitees

Friday, July 6, 2012

- 7. Un-tik Reminder
- Click Save.

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